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ABSTRACT

The procedure described here--written for the Frederick County Public Schools, Maryland--is an approach to planning, controlling, and evaluating organizational operations that emphasizes objectives and performance standards against which organizational results can be measured. The paper discusses purposes of the work plan and evaluation system, expected benefits to be derived, and processes for implementing the system. Described are four documents to be used in this management by objectives approach: system priorities, position descriptions, administrative work plans, and administrative performance evaluations. Forms are reproduced at the end for immediate use. (Author/LD)

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WORK PLAN AND EVALUATION SYSTEM OF THE FREDERICK COUNTY PUBLIC SCHOOLS

INTRODUCTION

The Work Plan and Evaluation procedure described here is an approach to planning, controlling, and evaluating organizational operations which places emphasis on clearly defined objectives and performance standards against which organizational results may be measured. Sometimes called management by objectives, this method of management usually involves at least (1) identification in writing of performance objectives by superiors and subordinates and (2) identification of how and by what time objectives should be reached.

In the Frederick County public schools, we will be introducing such a system in a limited way. As we gain experience, we will add to, subtract from, or revise our procedures.

The rest of this communication describes the Work Plan and Evaluation System by reference to:

1. Purposes
2. Expected Benefits
3. Elements and Processes
4. FY-78 Installation Procedures
5. FY-78 Installation Schedule
6. Plans for the Future

PURPOSES

Since the administrative structure of the Frederick County schools has been reorganized, and because the Board of Education has established clear directions for the school system, it is crucial that we systematically focus our energies on those priorities. The Work Plan and Evaluation System is

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intended to address the need to organize our work around those priorities. The specific purposes of the Frederick County system are:

1. Communication of system priorities to all personnel
2. Establishment of clear objectives for all administrative personnel consistent with system priorities and in concert with functional responsibilities represented in the reorganized system
3. Establishment of fair and objective procedures for evaluating administrative personnel and for appraising the work of the system

EXPECTED BENEFITS

The major expected benefit to be derived from the installation of the Work Plan and Evaluation System is more effective accomplishment of objectives. Other possible benefits include:

1. Better understood work expectations
2. Improved communications because objectives provide a common framework within which plans, progress, and performance may be discussed
3. Increased feedback on performance through review of performance progress
4. Facilitation of teamwork through identification of common objectives
5. Development of alternative ways of achieving objectives
6. Increased participation in decision making
7. Production of more precise and useful information for planning
8. Increased emphasis on results

ELEMENTS AND PROCESSES OF THE FREDERICK COUNTY WORK PLAN AND EVALUATION SYSTEM

The Frederick County Work Plan and Evaluation System revolves around the use of four documents. Those documents are: (1) System Priorities, (2) Position Description, (3) Administrative Work Plan, and (4) Administrative Performance Evaluation.

System Priorities

System priorities reflecting the goals of the Board of Education will be distributed by the Superintendent as the first step in the process. The priorities describe, in general terms, the most important work of the organization for the fiscal year.

Position Description

For each administrative position in the system, a position description has been, or will be, developed. The position description outlines the role and duties of each administrative job. Those duties provide the framework for determining the objectives and the kinds of activities to support objectives which administrative personnel may select.

Administrative Work Plan

The Administrative Work Plan is a form listing the system priorities addressed by an individual and the objectives designed to satisfy those priorities. Also included are major activities supporting the objectives, completion dates, and performance standards against which work on objectives may be measured.

Originally completed by the individual administrator, the Administrative Work Plan is then shared in a conference with the employee's immediate supervisor. In that conference the immediate supervisor assesses the plan in relation to (1) internal consistency, (2) relevance to system priorities, (3) feasibility, (4) relationship to objectives submitted by other subordinates, (5) consistency with the employee's position description, and (6) consistency with Board of Education policies and procedures. The immediate supervisor may wish to add, subtract, or revise objectives and activities.

Having reached agreement on the plan, the immediate supervisor then passes his subordinate's plans on to his supervisor. The process continues in that way until all plans reach the Superintendent. If irreconciliable differences should arise over the plan, those differences would also be taken to the next level and, if necessary, on to the Superintendent.

The Superintendent reviews the plans in much the same way described for each immediate supervisor. Once the Superintendent approves the plans, that approval is communicated and work on the listed objectives begins.

Administrative Performance Evaluation

The Administrative Performance Evaluation form is directly related to the Administrative Work Plan and will replace previously used administrative evaluation instruments. It lists the immediate supervisor's appraisal of the subordinate on the following points: (1) performance plan objectives achieved, (2) performance plan objectives not achieved, (3) performance on position description functions not included in the performance plan, and (4) management style. Also recorded are plans for the improvement of job

related competencies, resources needed to improve competencies, suggestions for system changes to improve performance, a general performance rating, recommended personnel actions, and employee reaction to the evaluation.

Although the performance evaluation is not completed until the end of the fiscal year, it is preceded by at least two progress reviews between the subordinate and his immediate supervisor. In those reviews, the subordinate reports on progress, explains discrepancies between actual and proposed completion dates, outlines problems, and reports needs for additional resources. The Administrative Performance Evaluation report, then, reflects any revisions agreed upon in the progress reviews and takes into account problems revealed in the progress review sessions over which the employee could not exercise control.

Once the report is signed by both the employee and the immediate supervisor, it is passed through the organization until it reaches the Superintendent's Office. The results of the Administrative Performance Evaluation may then be used for staff development planning and for establishing priorities in the ensuing fiscal year.

FY-78 INSTALLATION PROCEDURES

During FY-78 a limited Work Plan and Evaluation System will be initiated. The process will apply to the work of all persons paid on the administrative and supervisory scale.

Each employee will be asked to develop <u>three</u> objectives. At least one objective should be developed in response to system priorities. Owing to the nature of their position descriptions, some employees may only be working

on one objective related to system priorities, while all three objectives of other personnel may reflect system goals. Other responsibilities which are reflected in routine, maintenance, or reactive functions, and which comprise a considerable portion of the workload, will not be listed on the Administrative Performance Evaluation, although they will be part of the evaluation process.

It is expected that as personnel become comfortable with the process, the system may be expanded. Once the process is clearly understood, it will become apparent that the Work Plan and Evaluation System is a tool which can effectively organize work and serve to actually reduce administrative workload.

FY-78 INSTALLATION SCHEDULE

Action	Person(s) Responsible	Date(s) of Completion
1. Distribution of System Performance Priorities and Explanation of Work Plan and Evaluation System	Superintendent	September 23, 1977
2. In-Service on Plan for Those Affected	Superintendent and Area Directors	October 7, 1977
3. Completion of Individual Performance Plans	A&S Personnel	October 14, 1977
4. Review, Decision, Acceptance of Administrative Work Plans of Subordinates by Superordinates	A&S Personnel	October 28, 1977
5. Administrative Work Plans Received by the Superintendent	Superordinates	October 31, 1977
6. Administrative Work Plans Returned by Superintendent	Superintendent Assistant for Planning and Evaluation	November 8, 1977
7. Progress Reviews of Administrative Work Plans (2)	Superordinates Review with Subordinates	January 31, 1978 March 31, 1978
8. Completion of Administrative Performance Evaluation Reports	Superordinates	June 30, 1978
9. Administrative Performance Evaluation Reports Received by the Superintendent	Superordinates	July 7, 1978

PLANS FOR THE FUTURE

Experience gained in FY-78 and information received on FY-78 Administrative Performance Evaluation reports will provide data on the need for changes in the system. In addition, a management information center, operating out of the Office of Planning and Evaluation, will be established during FY-78. That center will collect in one central location data important to needs assessment for system priorities. The Work Plan and Evaluation System process for FY-79, then, would begin with a more systematic needs assessment, followed by a schedule similar to the one described for FY-78.

SYSTEM PRIORITIES FOR FISCAL YEAR 1978

Board of Education of Frederick County

The most important work before us as we go through this school year is the effective implementation of the approved task force recommendations which were made last spring and over this summer. With the addition of only a few other items, I see this year as one in which we implement and improve upon those recommendations. The priorities listed below reflect the need to consolidate our gains.

CONTINUATION PRIORITIES

1. Complete implementation of the task force recommendations for improvement in instruction in the basic skills.
   a. Complete the development of marked deficiency evaluation and curriculum.
   b. Monitor and evaluate the system for quarterly recording and reporting of student progress.
   c. Complete implementation of the language arts curriculum K-12, develop the methods to assess its effectiveness, and report on its impact and on suggestions for improvement.
   d. Complete implementation of the mathematics curriculum K-8, develop the methods to assess its effectiveness, and report on its impact and on suggestions for improvement.
   e. Complete implementation of the integration of basic skills instruction with other subject matter areas and report on its impact and on suggestions for improvement.
   f. Complete implementation of the developmental skills program, assess its effectiveness, and report on its impact and on suggestions for improvement.

2. Consistently apply the discipline and attendance policies and procedures which appear in the Policies and Procedures Handbook, assess their effectiveness, and report on their impact and on suggestions for improvement.
3. Provide additional alternatives for disruptive youth.
4. Implement, assess, and improve the effectiveness of procedures to increase parental involvement in the schools and to improve school-community relationships.
5. Implement, assess, and improve the effectiveness of the reorganization plan.
6. Implement, assess, and improve the effectiveness of plans to increase participation in school food service menu planning.
7. Monitor, assess, and improve the effectiveness of the plan of administrative reorganization.
8. Implement, assess, and improve the effectiveness of the Work Plan and Evaluation System.

NEW INITIATIVES

1. Evaluate and make recommendations regarding revision of the family life curriculum.
2. Design and begin a training program to improve the personnel evaluation skills of school principals.
3. Develop a clear and consistent homework policy.
4. Develop a clear and consistent promotion policy.
5. Refine and expand educational opportunities for exceptional children.
6. Develop a systematic procedure for determining on a continuing basis the cost effectiveness of programs, policies, and procedures.

7. Design and begin a continuing training program to improve the skills of support personnel.

MANAGING THE RESPONSE TO SYSTEM PRIORITIES

Although the list of priorities may seem imposing, the framework for working with continuation priorities has already been developed through the action plans which were designed last year. Four of the seven new initiatives are essentially extensions of task force action plans.

The management method by which these priorities will be addressed is described in the document, Work Plan and Evaluation System. Each member of the administrative and supervisory staff will develop and be responsible for the achievement of at least one objective related to these priorities. Some members of the administrative and supervisory staff, according to their position descriptions, will be spending most of their time on objectives directly responsive to the priorities. Others, however, because of the nature of their jobs, will continue to spend most of their time on maintenance, reactive, or routine functions.

ADMINISTRATIVE WORK PLAN
BOARD OF EDUCATION OF FREDERICK COUNTY

Name of Employee:	Title:	Date of Preparation:
Approval/Acceptance Signatures: Employee	Date:	Immediate Supervisor — Date:
Superintendent:	Date:	

System Priority Objectives: Specific key results stated in measurable terms.	Activities: Major action steps to achieve objectives.	Completion Date	Performance Standards: Criteria for accomplishment.
Priority: Objective 1.0	1.1		

ADMINISTRATIVE WORK PLAN
BOARD OF EDUCATION OF FREDERICK COUNTY
CONTINUATION
PAGE _____

System Priority Objectives: Specific key results stated in measurable terms.	Activities: Major action steps to achieve objectives.	Completion Date	Performance Standards: Criteria for accomplishment.

ADMINISTRATIVE PERFORMANCE EVALUATION
BOARD OF EDUCATION OF FREDERICK COUNTY

Name of Employee: Title:
Name of Evaluator: Title:
Date of Report:

Performance Plan Objectives Achieved/Comments:

Performance Plan Objectives Not Achieved/Comments:

Assessment of Performance on Position Description Functions Not Included in the Performance Plan:

Assessment of Management Style (e.g., decision making, staff and community relationships, problem solving, delegation):

Plan of Action for Improvement of Job Related Competencies.
Competencies:

Resources Needed:

Suggestions for System Changes to Improve Performance (e.g., workload distribution, staffing, position description):

Performance Rating (Check one):
Superior _____
Satisfactory (meets requirements of position)_____
Needs Improvement (to meet requirements of position)_____
Unsatisfactory _____

Recommended Personnel Action:

Employee Reaction (Check one): Agree_____ Disagree_____ (Attach comments)

_____ _____
Employee Signature Date Evaluator Signature Date

BOARD OF EDUCATION OF FREDERICK COUNTY
OFFICE OF PLANNING AND EVALUATION
REVIEW OF ADMINISTRATIVE PERFORMANCE PLANS

Employee _____ Date of Review _____

Location _____

Rating		Dimension
Satisfactory	Unsatisfactory	
1. _____	_____	Objectives stated in measurable terms
2. _____	_____	Activities related to objectives
3. _____	_____	Completion dates realistic
4. _____	_____	Performance standards measurable, realistic and related to objectives and activities
5. _____	_____	At least one objective related to system priorities
6. _____	_____	Objectives and activities consistent with one another
7. _____	_____	Plans are feasible
8. _____	_____	Plans are consistent with position description
9. _____	_____	Plans are consistent with Board of Education policies and procedures

Suggested Revisions:

Suggested Linkages:

Comments:

SUMMARY OF WORK PLAN AND EVALUATION OBJECTIVES
FY 78

PRIORITY _____

Objectives	Employee	Location

BOARD OF EDUCATION OF FREDERICK COUNTY - Frederick, Maryland

TEACHER OBSERVATION EVALUATION

Teacher _____ School _____ Date _____

Teacher Assignment _____ Observer/Evaluator _____

Number of Observations _____ / Evaluations _____

Recommended for Reappointment _____

	SUPERIOR	ABOVE AVERAGE	SATISFACTORY	DOES NOT APPLY	NOT SATISFACTORY
TEACHING COMPETENCIES					
1. DEMONSTRATES KNOWLEDGE OF SUBJECT MATTER					
2. DEMONSTRATES EVIDENCE OF EFFECTIVE DAILY PLANNING					
3. PROVIDES FOR INDIVIDUAL NEEDS AND INTERESTS					
4. UTILIZES CLASSROOM TIME EFFECTIVELY					
5. DEMONSTRATES VARIETY OF TEACHING TECHNIQUES					
6. DEMONSTRATES USE OF A VARIETY OF INSTRUCTIONAL RESOURCES AND MATERIALS					
7. USES EVALUATION EFFECTIVELY TO PROMOTE STUDENT GROWTH					

COMMENDATIONS _____

RECOMMENDATIONS _____

CLASSROOM MANAGEMENT					
1. DEMONSTRATES FAIR, FIRM, AND CONSISTENT BEHAVIOR TOWARD STUDENTS					
2. PROMOTES SELF-DISCIPLINE AMONG STUDENTS					
3. PROVIDES A WELL ORGANIZED, ATTRACTIVE ROOM THAT REFLECTS CURRENT LEARNINGS					
4. ACCEPTS RESPONSIBILITY FOR CARE AND USE OF MATERIALS, SUPPLIES AND EQUIPMENT					
5. ASSUMES RESPONSIBILITY FOR ROUTINE DISCIPLINARY MEASURES					

COMMENDATIONS _____

RECOMMENDATIONS _____

PERSONAL QUALITIES					
1. DEMONSTRATES EFFECTIVE COMMUNICATION SKILLS					
2. DEMONSTRATES POSITIVE INTERPERSONAL RELATIONSHIPS					
3. MAINTAINS RAPPORT WITH STUDENTS					
4. MAINTAINS CLEAN AND NEAT APPEARANCE					

COMMENDATIONS _____

RECOMMENDATIONS _____

PROFESSIONAL CHARACTERISTICS					
1. SHOWS EVIDENCE OF PROFESSIONAL GROWTH					
2. APPLIES ETHICAL STANDARDS IN PROFESSIONAL RELATIONSHIPS					
A. RESPECT FOR GROUP DECISIONS					
B. RESPECTS PROFESSIONAL CONTRIBUTIONS OF COLLEAGUES					
3. FOLLOWS SCHOOL BOARD POLICIES AND ADMINISTRATIVE PROCEDURES					

COMMENDATIONS _____

RECOMMENDATIONS _____

INSTITUTIONAL RESPONSIBILITY					
1. ASSUMES AN ACTIVE ROLE IN SCHOOL AND STUDENT ACTIVITIES					
2. DEMONSTRATES RESPONSIBILITY FOR SCHOOL REPORTS AND RECORDS.					
A. BY PROMPT COMPLETION					
B. BY ACCURATE COMPLETION					
C. BY NEAT COMPLETION					
3. SUPPORTS THE PHILOSOPHY AND OBJECTIVES OF THE SCHOOL					
4. RECOGNIZES VARIED APPROACHES OTHERS MAY USE IN CARRYING OUT OBJECTIVES OF THE SCHOOL PROGRAM					
5. UTILIZES ESTABLISHED CHANNELS FOR POSITIVE CHANGE					

COMMENDATIONS _____

RECOMMENDATIONS _____

_____ PRINCIPAL SIGNATURE

_____ TEACHER SIGNATURE